

# FUNDRAISING CHECKLIST

BELINDA ELLSWORTH

Fundraising is a **\$19 billion** market.  
Are you taking advantage of that opportunity?



The great part of fundraising programs is that people want to support their communities. Fundraising can introduce you and your product to an entirely different crowd.

Are you excited at the prospect of fundraising but don't know where to get started?

Follow these tasks to secure a rewarding fundraising opportunity:

# FUNDRAISING CHECKLIST

BELINDA ELLSWORTH

**1. Fundraising Lead Notebook.** Just like when you are working to book parties, write down a list of every organization you can think of who might benefit from this program. Keeping a list is a great and easy way for you to keep track of the organizations in your area, the ones you have contacted and their level of interest.

**2. Have Fundraising Packets on Hand:** You want to be sure to always have your Fundraising Packets ready so that when you meet with organizations, you have all the necessary information. It is important to always have a few of these on hand, just like your host and recruiting packets. Keep a few in your dedicated office space and even one in your car. You never know when the opportunity to discuss fundraising might appear.

A Fundraising Packet would include a letter from you to the organization, the benefits of fundraising with your company, the income potential as well as your Fundraising catalog.

# FUNDRAISING CHECKLIST

BELINDA ELLSWORTH

**3. Get Involved in Your Community.** People want to do business with people they know, like and trust. Get involved in your community and network with organizations. When you share a genuine and authentic desire to help a community or organization, those involved are more likely to work with you because of your commitment and dedication. Get involved in the parent-teacher association at school, local community centres, groups, clubs and so on.

## Sample Script of What to Say

Once you have your list, it's time to get on the phone and connect with the organizations you're interested in partnering up with.

Here is an example of what to say:

"Hi Heather, my name is Belinda Ellsworth and I am an independent consultant for \_\_\_\_\_ and I was wondering if you had a few minutes to discuss an amazing fundraising opportunity for your organization? Great! Heather, in case you have not heard of \_\_\_\_\_, we offer \_\_\_\_\_ . We offer fundraising program that is fun and easy.

# FUNDRAISING CHECKLIST

BELINDA ELLSWORTH

Our program is very competitive with other programs and we offer \_\_\_% profit to your organization.

The product is easy for your members to sell and as mentioned, generates significant funds for the programs that are most important to your organization.

I would love to be able to speak with you further in person. What works best for you - mornings or afternoons?"

From there you will want to secure a date with the organization where you will share your Fundraising Presentation as well be able to answer any questions they have.

## **Getting Ready Checklist**

So you've got a meeting. Now what? Follow this quick checklist to ensure you are well prepared to optimize this opportunity:

- \_\_\_ Contact organization to schedule an in-person meeting.
- \_\_\_ Have a few Fundraising Opportunity Packets on hand. There may be more than one representative at the meeting who requires one.

# FUNDRAISING CHECKLIST

BELINDA ELLSWORTH

\_\_\_ Practice your presentation to sound comfortable and confident.

\_\_\_ Have samples on hand to share with the chairperson of the organization. You will want to leave these behind at the meeting.

\_\_\_ Schedule a follow-up meeting with the organization where you will be able to answer any additional questions.

\_\_\_ Begin the application process to submit to your Home Office (if applicable)

\_\_\_ Schedule a mini-training session with the organizers of the fundraiser to maximize the program.

Once you have secured a fundraiser and met with the organizers, it is time to **start selling!**

Here is a list of items you will need for the organization:

1. Fundraising Catalogs
2. Master Order Form
3. Tally Sheets for Members
4. Fundraising Poster for them to market.

# FUNDRAISING CHECKLIST

BELINDA ELLSWORTH

## Follow Up Check List

Once the fundraiser has ended, you will want to use this follow-up checklist:

\_\_\_ Collect tally sheets from organization and complete master order form with chairperson.

\_\_\_ Submit order to Home Office.

\_\_\_ Have business cards and contact labels ready for when the order is shipped. You want to be sure the customers know how to get in contact with you if they want to re-order. You can also include a hosting/recruiting postcard.

\_\_\_ Schedule a time to drop off the order at the organization. Be available to answer any questions they have.

\_\_\_ Two days after you have dropped off the product, mail a thank-you letter to the organizer of the fundraiser.

\_\_\_ Keep in touch! Don't let the relationship fizzle. Stay in contact with the organization and develop an authentic, networking relationship. Continue to show an interest and support for their organization.